

**ATTACHMENT A:**

**REQUEST FOR QUOTE FOR  
ENVIRONMENTAL PROTECTION AGENCY'S  
ENERGY STAR Website and Related Database Services**

**GSA EBUY RFQ Number: RFQ1284532**

**Instruction to Offerors (ITO)**

**I. REQUIREMENT**

The Environmental Protection Agency (EPA) is requesting price and technical quotes from contractors on GSA Schedule 70 for the work outlined in the attached Statement of Work (SOW) entitled “**ENERGY STAR Website and Related Database Services**”

The NAICS is 541512 Computer Systems Design Services has a size standard of \$27.5 million. The vender shall be registered in SAM.gov prior to award.

The government will award a single delivery order to the contractor whose offer conforms to this request and is most advantageous to the government, price and other factors considered.

This RFQ requirement includes a base contract period of performance of 365 days and two option periods of 365 days each. The total period of performance shall not exceed three (3) years.

For this requirement, EPA will be evaluating and awarding this requirement as a Best Value Trade Off procurement.

**The government intends to issue an award no later than 30 May 2018. The contractor is required to start work within seven (7) days of contract award date. The POC for this requirement is Megan M. McMullen and can be reached at [McMullen.Megan@epa.gov](mailto:McMullen.Megan@epa.gov).**

**II. QUOTE INSTRUCTIONS:**

The technical offer must be no longer than 20 pages and must address the following:

**Factor I: Technical**

Element I: Approach:

The contractor shall provide a written discussion that addresses the approach to accomplishing the tasks and activities of the SOW.

## Element II: Relevant Experience:

Offerors shall submit experience pertaining to all contracts and subcontracts currently in process, or completed within the past three (3) years, which are similar in nature to the requirements described in the SOW. In particular, demonstrated experience in providing timely and accurate technical and market support to federal agencies that design and implement complex energy efficiency programs and initiatives, and in working closely with companies and organizations in the utility, commercial, institutional and industrial sectors.

### **Factor II: SCHEDULE**

The government intends to make an award no later than 30 May 2018. The contractor shall demonstrate an ability to meet the government's start date of 06 June 2018 by submitting a project management plan (PMP).

### **Factor III: PRICE**

The Contractor shall provide a price quote in accordance with the attached Price Schedule (Attachment C).

## **III. EVALUTION CRITERIA:**

The Contractor's quote will be evaluated to determine how well the offer adheres to the requirement of the SOW and the criteria listed in the ITO.

### **Factor I: Technical (Best Value Trade Off)**

#### Element I: Approach

Offerors will be evaluated for appropriateness, completeness, and overall quality of the approach to accomplishing the tasks and activities of the SOW.

#### Element II: Relevant Experience

Offerors will be evaluated on the information presented in their written submission pertaining to all contracts and subcontracts currently in process, or completed within the past three (3) years, which are similar in nature to the requirements described in the SOW. In particular, demonstrated experience in providing timely and accurate technical and market support to federal agencies that design and implement complex energy efficiency programs and initiatives, and in working closely with companies and organizations in the utility, commercial, institutional and industrial sectors.

The Government intends to rate Factor I (Technical) as a best value trade off with Factor III (Price). Factor I (Technical) is significantly more important than Factor III (Price), although price remains an important and significant factor. The Government will assign a rating of Outstanding, Good, Acceptable, Marginal or unacceptable.

Rating	Description
Outstanding	Quote meets requirements and indicates an exceptional approach and understanding of the requirements. Strengths far outweigh any weaknesses. Risk of unsuccessful performance is very low.
Good	Quote meets requirements and indicates a thorough approach and understanding of the requirements. Proposal contains strengths which outweigh any weaknesses. Risk of unsuccessful performance is low.
Acceptable	Quote meets requirements and indicates an adequate approach and understanding of the requirements. Strengths and weaknesses do not outweigh one another or will have little or no impact on contract performance. Risk of unsuccessful performance is no worse than moderate.
Marginal	Quote does not clearly meet requirements and has not demonstrated an adequate approach and understanding of the requirements. The proposal has one or more weaknesses which are not outweighed by strengths. Risk of unsuccessful performance is high.
Unacceptable	Quote does not meet requirements and contains one or more deficiencies. Proposal is unacceptable for purposes of an award

If any vendors are rated Marginal or Unacceptable, they may not be eligible for an award. The government reserves the right to hold or not to hold discussions.

### **Factor II: Schedule (Acceptable or Not Acceptable)**

Schedule is an important factor for this requirement. The government intends to issue an award no later than 30 May 2018. The offeror will be required to start work no later than 06 June 2018. Offerors will be evaluated based on their offered Project Management Plan (PMP).

The Government intends to rate Factor II (Schedule) as acceptable and not acceptable.

Rating	Description
Acceptable	Quote clearly meets the minimum requirements of the project schedule.
Unacceptable	Quote does not clearly meet the minimum requirements of the project schedule.

If a vendor is rated unacceptable, they will not be eligible for award.

### **Factor III: Price (Best Value Trade Off)**

The Government will evaluate the price quote for reasonableness when compared to the competition and/or the Independent Government Estimate (IGE).

## **ATTACHMENT B:**

### **ENERGY STAR Website and Related Database Services For the Climate Protection Partnerships Division STATEMENT OF WORK**

#### **I. Details**

##### **Task Order Contract Officer Representative (COR)**

Gwendolyn Taylor

OAR/OAP/PPD/IO

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Location: 1201 Constitution Ave, NW, Washington, DC 20004; 202-343-9472

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##### **Alternate Contract Officer Representative (ALT COR)**

Brian Ng

OAR/OAP/PPD/ESRB

Mailing Address: US EPA, 1200 Pennsylvania Ave, NW (6202A), Washington, DC 20460

Location: 1201 Constitution Ave, NW, Washington, DC 20004; 202-343-9162

[Ng.Brian@epa.gov](mailto:Ng.Brian@epa.gov)

#### **II. Background and Purpose**

PPD forges partnerships with private and public organizations to promote cost-effective energy-efficient technologies. PPD delivers the technical information and tools that organizations and consumers need to choose energy efficient solutions and best management practices. The division's success is dependent in part on the information management infrastructure which tracks these partnerships, and collects and disseminates information to the public.

The primary purpose of this Statement of Work (SOW) is to design, develop, implement, and maintain information technology solutions that will enable ENERGY STAR to effectively partner and communicate with key industry stakeholders, develop and implement public outreach and education tools and activities, implement and communicate program and policy initiatives, and maintain the integrity and value of the ENERGY STAR brand. Information technology solutions are critical in meeting stakeholders' expectations for information delivery as ENERGY STAR continues to grow and change. ENERGY STAR needs IT solutions that can accommodate and adapt quickly to significant policy and programmatic changes without the use of additional staff resources.

More specifically, the need for quick and accurate data collection of partner information via the web is becoming more and more important. ENERGY STAR partners need a user-friendly way to interface electronically with the program. A primary focus will be the transition from iSTAR to ES Connect (using the Salesforce platform) for IT program management. Only through the

integrated utilization of information technology can ENERGY STAR meet the demands of its many and diverse customers.

The ENERGY STAR Certified Homes program (ESCH) forms voluntary partnerships with home builders, home energy raters, architects/building designers, HVAC contractors and utility programs to build and market energy efficient homes to prospective homebuyers and energy efficiency improvements to existing homes in the U.S. ENERGY STAR provides its partners with a brand name label, sales and marketing assistance, and technical tools and information.

### III. Scope

Under this Task Order, the Contractor shall provide complete life-cycle operation and management support for the ENERGY STAR ([www.energystar.gov](http://www.energystar.gov)) website for the division-wide legacy database known as (iSTAR) and any related subsequently developed or acquired applications or systems. The two must interact with each other through user-friendly, secure Web interfaces. Some of the data in legacy iSTAR (such as lists of partners, and ENERGY STAR labeled products) is posted on the website and refreshed frequently.

CPPD is continually seeking to automate manual processes to increase performance and reduce cost for both ourselves and our partners. Contractor shall also provide a monthly website analytics report regarding the usage of the website with recommendations for how to improve the site.

The legacy iSTAR application and its subsequent revision commands a pivotal role within the ENERGY STAR technology portfolio. Legacy iSTAR is the internal interface for content management, user administration and reporting for six critical systems including [www.energystar.gov](http://www.energystar.gov), Qualified Products Exchange (QPX), and MESA. The application is now over 14 years old and has not benefited from any significant enhancements in over five years.

EPA has begun the conversion of legacy iSTAR and some of our customized database/customer support applications to more current and comprehensive software solutions that will increase performance and reduce cost for both ourselves and our partners. Technical research was conducted and several leading commercial-off-the-shelf (COTS) as well as custom build solutions were assessed to address the needs identified. EPA subsequently selected the **Salesforce** Customer Relationship Management (CRM) product as the redesign solution and **the legacy iSTAR replacement known as ES Connect**

Under this Task Order, the Contractor shall provide redesign, development and complete life-cycle support for the division-wide database (legacy iSTAR) and the new ES Connect (using the **Salesforce** CRM product) and any subsequently developed or acquired database application or systems. The ES Connect database must interact with the ENERGY STAR website ([www.energystar.gov](http://www.energystar.gov)) and its related tools and resources through user-friendly, secure Web interfaces. Some of the data in ES Connect (such as lists of partners, and ENERGY STAR labeled products) is posted on the website and refreshed frequently. We would like to improve and expand the ability for our external partners to update their own information in ES Connect, via the website and mobile capabilities. The ES Connect system upgrade and redesign will address 6 major areas of improvement and development:

1. Reducing and/or eliminating system maintenance challenges
2. Improving performance and reliability
3. Improving/Adding workflow efficiencies

4. Eliminating redundant, outdated and trivial content (ROT)
5. Replacing outdated look and feel
6. Developing solutions to address unfulfilled CRM needs

Also under this Task Order, the Contractor shall provide support for the migration of all Certified Homes Program legacy iSTAR data and related data collection, dissemination and management tools over to ES Connect. This includes ongoing O&M and needed enhancements of the legacy iSTAR database. It also includes ongoing O&M and updates of ENERGY STAR Certified Homes Program web pages and tools. This includes, but is not limited to, the following activities:

- Develop, test, implement and maintain ENERGY STAR Certified Homes Program data within the Salesforce environment. This includes the migration of the ENERGY STAR Certified Homes program legacy iSTAR module, Homes Reports, program-specific elements of legacy iSTAR tools (Query Tool, Ad Hoc Query, Business Intelligence, Org and Contact Combine, MESA, PEDRA) and ENERGY STAR Certified Homes program information tools that connect to legacy iSTAR including HOST/QRRA, OPA/PARA, Partner Locator, RaterPRO, and e-mail triggers.
- Continue to provide daily operation and maintenance of the ENERGY STAR Certified Homes program portions of the existing legacy iSTAR database. This includes the timely resolution of any and all defects to the ENERGY STAR Certified Homes program legacy iSTAR module, Homes Reports, program-specific elements of legacy iSTAR tools (Query Tool, Ad Hoc Query, Business Intelligence, Org and Contact Combine, MESA, PEDRA) and ENERGY STAR Certified Homes program information tools that connect to legacy iSTAR including HOST/QRRA, OPA/PARA, Partner Locator, and e-mail triggers.
- Develop, test and implement enhancements to the ENERGY STAR Certified Homes reporting process, additional efforts regarding HVAC stakeholders, running appropriate queries for the annual Market Leader awards program, and other data analysis as needed.
- Develop, test, implement, and maintain data collection or dissemination tools to further streamline data management processes for the ENERGY STAR Certified Homes program.
- Continue to support the data needs of the Certified Homes program while transitioning to the Salesforce platform.
- Update and maintain the Home Energy Yardstick and Home Advisor tools to help consumers improve the energy efficiency of their homes.

#### **IV. STATEMENT OF WORK**

In executing this work assignment, the Contractor shall at all times identify themselves as contractor employees and shall not present themselves as EPA employees. Furthermore, they shall not represent the views of the U.S. Government, EPA, or its employees. In addition, the contractor shall not engage in inherently governmental activities, including but not limited to actual determination of EPA policy and preparation of documents on EPA letterhead.

##### **Task 1: ENERGY STAR Administration & Meetings**

The contractor shall, per the EPA COR's request, participate in any technical discussions related to the development, enhancement, operation, and maintenance of the legacy

iSTAR/ES Connect database, related data collection tools and forms, and the Home Energy Yardstick and Home Advisor tools. The contractor shall, at the COR's request, provide the COR with written meeting summaries that include major topics of discussion, recommended courses of action, and any follow-up items for future discussion.

The contractor shall report progress to the EPA COR on all tasks via phone or e-mail at least once every two weeks and in person per the EPA COR's request. These progress reports shall include the following information: progress to date for individual tasks, LOE spent on each task to date, estimated LOE to complete each task, problems or issues, and any recommendations for reducing LOE required to complete tasks.

The contractor shall provide the EPA COR with monthly written progress reports summarizing work performed and resources expended during the prior month. These reports shall include written descriptions of work performed for each task, any problems or issues encountered, and work to be performed the following month. These reports shall include a breakdown of dollars and hours spent each month on each task. The reports shall also include a sum of dollars and hours spent to date, and a calculation of dollars and hours remaining to be spent. **The Contractor shall notify the EPA Contracting Officer and COR as soon as 75% of the total budget has been expended. Do not exceed the final approved budget.**

The contractor shall, upon issuance of this Task Order, develop an implementation plan and a schedule of deliverables, and a description of the staffing that will be utilized to address the requirements of this SOW.

Deliverable	Due
1.1 Written meeting summaries and any relevant supporting materials	Within 1 week following meeting.
1.2 Written or verbal progress updates and any relevant supporting materials	At least every two weeks
1.3 Written monthly progress reports and supporting materials	No later than the 15 <sup>th</sup> of the following month

## **Task 2: System Life Cycle Support**

The Contractor shall provide complete system life cycle support including requirements analysis, design, development, testing, data conversion, data quality analysis, implementation and maintenance for legacy iSTAR, ES Connect and the ENERGY STAR website.

Specific initiatives which are scheduled for development start and/or completion during the period of performance of this task order include:

- Continued Drupal maintenance of the ENERGY STAR website Homepage
- Tool Consolidation/Modernization (legacy iSTAR/ES Connect, MESA, Web Apps, Social Media, Emailing/Marketing)
- Website Redesign based on revisions to ENERGY STAR brand and web standards/styles (on-going).
- ENERGY STAR Logos Repository

- Adopting & maintaining Responsive Design (Mobile)
- Search Engine Optimization (SEO)
- Drupal Implementation for the Partner Resources section of the website

### **Task 3: Web Monitoring and Reporting:**

Tasks include, but are not limited to:

- Generating monthly Web Stats Reports
- Making recommendations and providing insight on how this information can be useful in improving the website, promotions, content changes, etc.

### **Deliverables**

Monthly ENERGY STAR Website Statistics Report.

Monthly ENERGY STAR Marketing Cloud (Mass Email Marketing Outreach) Report.

### ***Subtask 3.1: Web Operation and Maintenance for ENERGY STAR Certified Homes, Existing Homes, Multifamily, and Home Improvement Web Pages***

ENERGY STAR certified homes-related web pages will require ongoing updating and maintenance to ensure proper functionality at all times. They will also require organizational and design revisions to ensure adherence to all relevant Web standards and designs, as well as content revisions to reflect the most recent program information and marketing platform. As such, the Contractor shall, upon direction from the EPA COR, process Web-related change requests in a timely manner. The Contractor shall also periodically review existing Web pages for proper functionality and make necessary corrections using the most technically efficient, cost effective, and programmatically consistent solution. The Contractor shall also, with direction from the EPA COR, periodically review existing Web content for adherence to applicable Agency, Division, and Program-level Web standards and conventions as well as current ENERGY STAR brand identity guidelines. [The Contractor shall make corrections as necessary to bring ENERGY STAR Certified Homes Web pages into compliance using the most technically efficient, cost effective, and programmatically consistent solution. If there is more than one solution, the contractor shall present all options to the EPA COR for technical direction. The contractor will provide any Web changes for review by the EPA COR, then move the approved changes to the live server upon direction from the EPA COR. In addition,](#) the contractor shall interface and coordinate with other EPA staff, EPA Contractors, and key stakeholders as needed.

Work conducted under this Task may include, but not be limited to:

- Providing operations & maintenance support for ENERGY STAR Certified Homes-related Web pages including updating content to reflect the latest program and policy information;
- Adding utility bill, energy, and greenhouse gas savings estimates to the Partner Locator search results screens;



- Incorporating new graphical and messaging elements, including the incorporation of graphical and messaging elements from the latest brand marketing platform;
- Refreshing landing pages as needed including incorporating any new content and graphics associated with ENREGY STAR’s current branding platform or major outreach efforts;
- Developing and implementing minor additions and text modifications to existing ENERGY STAR New Homes Web pages in response to change requests;
- Developing and implementing new Web pages;
- Performing usability analyses and focus group testing on existing ENERGY STAR New Homes Web pages and recommending improvements;
- Recommending, implementing, and updating cost-effective search engine optimization tactics;
- Providing FAQ system support;
- Developing, testing, and implementing a new “tools and resources” search tool for all consumer and partner resources, similar in functionality and design to the infrastructure currently used by the C&I branch, which may include compiling a current inventory of all tools and resources currently on the web, assisting with categorizing and tagging tools and resources for searching by target audiences, and populating the tool with new resources;
- Development, implementation, and maintenance of an online, interactive map tool that features a consumer-friendly graphical user interface to allow easy access and updating of all national and region-specific technical requirements.

### **Deliverables**

Products, formats, and due dates to be determined by the EPA COR, but may include the following:

<b>Deliverables</b>	<b>Due</b>
3.1.1 At direction of EPA COR, provide qualitative and quantitative description of O&M problems, the pros and cons of possible solutions, and a recommendation for a cost effective solution including LOE estimates	TBD
3.1.2 At direction of EPA COR, implement O&M solutions either on a staging server or directly onto a production server per EPA COR’s direction.	TBD
3.1.3 At direction of EPA COR, analyze Web site user statistics and provide results of analysis	TBD
3.1.4 At direction of EPA COR, design and conduct user tests of Web pages and provide results of tests and an analysis of test results along with recommendations for content and/or formatting changes	TBD
3.1.5 At direction of EPA COR, provide a list of O&M activities implemented along with the LOE expended for each	TBD

### **Subtask 3.2: ENERGY STAR Certified Homes Program - Conversion of Web Content to Content Management Platforms**

ENERGY STAR Residential Branch Web content may require conversion to content management platforms such as Drupal to streamline web O&M processes. As such, the Contractor shall, upon direction from the EPA COR, convert web content to content management platforms. This includes, but is not limited to, the development of content management templates that meet the needs of the ENERGY STAR Residential Branch, converting web content to appropriate templates, assisting the EPA COR with managing web content using the content management system, and providing training to staff and other support contractors on the proper use of the content management system. The contractor shall also interface and coordinate with other EPA staff, EPA Contractors, and key stakeholders as needed.

#### **Deliverables**

Products, formats, and due dates to be determined by the EPA COR, but may include the following:

<b>Deliverables</b>	<b>Due</b>
3.2.1 At direction of EPA COR, develop content management system templates for use in converting web content.	TBD
3.2.2 At direction of EPA COR, implement content management templates and convert content for review by the EPA COR.	TBD
3.2.3 At direction of EPA COR, assist with content management tasks as needed.	TBD

### **Subtask 3.3: ENERGY STAR Certified Homes Program - Deleting and/or Archiving Outdated Web Pages**

Stakeholders and consumers have made the ENERGY STAR Residential Branch aware of the issue of links to outdated Web pages and online documents appearing in browser search results. This has caused confusion about program and policy updates and changes and has resulted in the spreading of outdated and incorrect policy and technical information to partners who implement the ENERGY STAR Certified Homes program. In addition, although some outdated Web content has been removed it may or may not have been archived for internal use by the branch. Archiving Web content containing past policy and technical information allows the branch to keep chronological track of when certain policy and technical updates were released and took effect. This in turn helps the branch address questions from stakeholders and consumers about past policy decisions and technical changes. As such, the Contractor shall, upon direction from the EPA COR, conduct a search for old and outdated Web pages and online documents and either delete them completely or remove them from the live server to prevent them from appearing in browser search results but archive them so they are quickly accessible upon request by the ENERGY STAR Residential Branch. The contractor shall also interface and coordinate with other EPA staff, EPA Contractors, and key stakeholders as needed.

#### **Deliverables**

Products, formats, and due dates to be determined by the EPA COR, but may include the following:

<b>Deliverables</b>	<b>Due</b>
3.3.1 At direction of EPA COR, provide a written listing of all outdated Web pages and documents including the links to these pages and documents	TBD
3.3.2 At direction of EPA COR, provide a written description of the actions taken for each of the outdated Web pages and documents to either delete the outdated information or remove the information from the live server and archive the information for future internal use by the ENERGY STAR program. This written description should include links to any archived information and any necessary information required to access the archived information	TBD
3.3.3 At direction of the EPA COR, provide and implement a schedule and procedure for regularly searching for outdated or “orphaned” Web pages and documents and taking any necessary action to delete and/or archive the information	TBD

#### **Task 4: Legacy iSTAR Redesign and Development**

The Contractor shall provide support including requirements analysis, design, development, testing, data conversion, data quality analysis, implementation and maintenance for the legacy iSTAR system and connections to the ENERGY STAR website and related ENERGY STAR tools and applications. Contractor will use its User-Centered Design (UCD) methodology and Agile Development processes to assess and upgrade the system.

The legacy iSTAR Redesign project is projected to be fully implemented over a 5-year period. The redesign and new system will include, but is not limited to, the following Salesforce products:

- Service Cloud – Unlimited Edition – Gov Cloud
- Customer Community Plus – Unlimited Edition – Gov Cloud
- Data.com Premium Clean – Unlimited Edition
- Government Cloud Premier + Success Plan (Unlimited Edition) & Data.com Premier Success Plan +

#### **Deliverables**

- Salesforce Development (Continuous Backlog Development and Testing for all Branches)
- Communities Plus (OPA/PARA for All Branches to onboard and approve new partners)
- Communities Plus (MESA [Partner Access]/PEDRA [Contractor Approval] for All Branches)
- ENERGY STAR Partner Directory
- Communities Plus (MESA [Partner Access]/PEDRA [Contractor Approval] for ENERGY STAR Logos for all Branches)
- Other cross Branch directories and reporting applications on the website

- Communities Plus (MESA [Partner Access]/PEDRA [Contractor Approval] for HOST homes submission and QRRR homes approval)
- Communities Plus (MESA/Awards [Partner Access] and Awards approval and processing for all Branches)
- Communities Plus (MESA [Partner Access]/PEDRA [Contractor Approval] for HOST homes submission and QRRR homes approval)
- Communities Plus (MESA [Partner Access]/PEDRA [Contractor Approval] for all Branch tools, document repositories and reporting/reports)
- New Homes Partner Directory

#### **Subtask 4.1: iSTAR Database O&M/Salesforce Platform Transition Support for ENERGY STAR Residential Branch**

Under this task the Contractor shall, upon direction from the EPA COR, provide technical support for the operation and maintenance of iSTAR database functionality as it directly impacts ENERGY STAR for Homes, while the Salesforce re-design is underway. The Contractor shall present all available options to the EPA COR for correcting any errors or defects, and will implement the most technically feasible and cost effective solution. The contractor shall also interface and coordinate with other EPA staff, EPA Contractors, and key stakeholders as needed. Elements of this task include, but are not limited to:

- Conduct quality check on automated emails generated from iSTAR
- Adding/removing email triggers as needed
- Updating email triggers as Builder Training format changes.
- Adding new email triggers to support any new functionality as necessary.
- Conduct ad hoc queries that audit iSTAR data to ensure all rules for information collection, tracking, and display are being followed
- Provide documentation describing the functioning, logic, and data requirements of the New Homes iSTAR database module and associated reports and tools
- Archiving old data as needed, during transition to Salesforce
- Participating in the Division-wide effort to transition to the Salesforce platform.
- Continue work on “base” data and requirements for the Residential program.

Deliverables	Due
4.1.1 At direction of EPA COR, make corrections to defects on a staging server and provide a link to the changes for review and approval by the COR	TBD
4.1.2 At direction of EPA COR, post corrections to live server (for Salesforce, when that platform is live)	TBD
4.1.3 At direction of EPA COR, provide results of ad hoc queries and audit reports of iSTAR data	TBD

4.1.4 At direction of EPA COR, provide status reports regarding O&M activities, including a description of actions taken and hours and costs incurred to fix the defect	TBD
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### **Task 5: System Life Cycle Support**

Tasks include, but are not limited to:

- On-going operation and maintenance of the legacy iSTAR system and its replacement ES Connect, along with connected EPA tools and related ES Connect (Salesforce) products
- Provide recommendations and insight as to how the ES Connect systems and Salesforce products identified above in Section III-Scope can be useful in improving the website, promotions, content changes, etc. of the ENERGY STAR program.

#### **Deliverables**

Agile Development update meetings (ongoing)

Legacy iSTAR /ES Connect Development (Milestones) Report (ongoing)

Monthly Budget Report (categorized as follows:

- ES Connect License Fees (Salesforce)
- ES Connect Training
- ES Connect Development Labor
- ES Connect Development O&M

### **Task 6: ENERGY STAR Certified Homes Program - O&M for Data Collection/Dissemination Tools**

ENERGY STAR Certified Homes-related data collection and dissemination tools, forms, and applications will require ongoing updating and maintenance to ensure proper functionality at all times. They may require organizational and design revisions to ensure adherence to all relevant Web standards and designs, as well as content revisions to reflect the most recent program information regarding ENERGY STAR Certified Homes. As such, the Contractor shall, upon direction from the EPA COR, process change requests to New Homes-related tools, forms, and iSTAR applications (including support for the broader iSTAR redesign effort) revisions in a timely manner. This includes O&M for the Homes Online Submittal Tool (HOST), the Quarterly Report Review Application (QRRRA), My ENERGY STAR Account (MESA), Online Partnership Application (OPA), PARA, Partner Locator, and e-mail triggers. [The contractor shall test all O&M-related changes on a test server and allow EPA to review the changes prior to posting the changes to the live server. The contractor shall also interface with other support contractors and key stakeholders as needed.](#)

#### **Deliverables**

Products, formats, and due dates to be determined by the EPA COR, but may include the following:

<b>Deliverables</b>	<b>Due</b>
6.1 At direction of EPA COR, provide description of O&M problems, possible solutions, and a recommendation for a solution including LOE estimates	TBD

6.2 At direction of EPA COR, post O&M related changes to a staging server for EPA review and approval	TBD
6.3 At direction of EPA COR, post O&M changes to the live server	TBD
6.4 At direction of EPA COR, provide a list of O&M activities implemented along with the LOE expended for each	TBD

#### **Task 7: ENERGY STAR Certified Homes Program - Enhancements to Data Collection/Dissemination Tools**

The primary goals of this task are to enhance the functionality of existing data collection and dissemination tools, forms, and applications that are used to collect and exchange information with stakeholders. This applies to the migration of data collection and dissemination tools to Salesforce and any needed enhancements to ENERGY STAR Certified Homes Program-related elements of tools including HOST/QRRA, OPA/PARA, Partner Locator, and e-mail triggers. This also includes, but is not limited to:

- Enhancing HOST so that EPA can open it for Providers for anytime reporting
- Enhancing HOST to accommodate stricter partnership requirements for builders and Home Energy Raters to participate in our program.
- Enhancing MESA, OPA, and legacy iSTAR to continue to meet various programmatic changes such as the revised Market Leader Awards requirements, the Market Leader web pages, and the status of the “100% Committed” partners.
- Updating the technical specification regional maps.
- Adding fields to the Business Intelligence Tool if needed.
- Continuing to enhance OPA and ES Connect generally.
- Enhancing the Certified Homes Program module within ES Connect to accommodate exchange of information for users of the RaterPRO app.

The Contractor shall develop, test, and implement enhancements and shall coordinate with other EPA staff, EPA Contractors, and key stakeholders as needed. An electronic copy and a hard copy of all draft and final deliverables will be provided to the EPA COR upon request, including requirements gathering and specification documentation.

<b>Deliverables</b>	<b>Due</b>
7.1 At direction of EPA COR, provide documentation describing EPA's requirements and specifications for enhancements, including wireframes and HTML prototypes, if applicable	TBD
7.2 At direction of EPA COR, post enhancements to a staging server for review and approval prior to posting on a live server	TBD

7.3 At direction of EPA COR, conduct user testing of enhancements on staging or testing server and provide results of testing and options for addressing major problems	TBD
7.4 At direction of EPA COR, provide a list of all enhancements that were requested and implemented and an LOE for each	TBD

### **Task 8: ENERGY STAR Certified Homes Program - Update and Maintain the ENERGY STAR Home Advisor and Home Energy Yardstick Tools**

The ENERGY STAR Home Advisor and Home Energy Yardstick are electronic tools that communicate the value of energy efficiency to consumers by helping consumers understand their homes' current energy consumption relative to other similar homes, and to understand ways they can improve their homes' energy efficiency. In the performance of activities under this task, the contractor shall interface and coordinate with other EPA staff, EPA Contractors, and key stakeholders as needed. Work under this task has been organized by the following subtasks:

#### ***Subtask 8.1: Modify and update the ENERGY STAR Home Advisor tool as requested, including adding additional functionality.***

This task may include, but is not limited to:

- Creating new webpages
- Creating a new database or updating an existing database
- Allowing users to export and/or print their data in specified format
- Providing pathways for users to connect to social media
- Adding validation checks to Home Advisor wizard inputs
- Adding notifications to users when information required for completion is blank
- Adding data points to the Home Advisor

Deliverable: Provide the EPA COR with weekly status updates via phone or email

Due date: TBD in change requests

#### ***Subtask 8.2: Provide user support for the new Home Advisor tool.***

This task may include, but is not limited to:

- Technical support for users

Deliverable: User support as needed

Due date: TBD by technical directive

#### ***Subtask 8.3: Make modifications the Home Energy Yardstick, as needed.***

This may include updating the Yardstick to link to the Home Advisor. The contractor may need to create new pages or modify existing pages of the ENERGY STAR web site to complete this task.

Deliverables: TBD in change request

Due Date: TBD

#### ***Subtask 8.4: Update the Home Energy Yardstick Web Services: User's Guide as needed.***

The contractor shall review and make appropriate updates to the manual when requested. This task shall also include technical support for third party organizations using the manual to customize the HEY application on their website.

Deliverables: User support as needed

Date: TBD by technical directive

***Subtask 8.5: Update as needed a web service to allow users to upload information into the new Home Advisor tool.***

In addition, update the ENERGY STAR Home Advisor Web Services: User's Guide. The contractor shall finalize the manual and update it as needed. This task shall also include technical support for third party organizations using the web service.

Along with the simple web service, create additional related functionality as specified. This will likely include the following:

- Add/update data points
- Validations on web service
- API Documentation
- Security features to authenticate users
- Allow users to export data
- Query aggregate information such as number of uploads/downloads
- Allow import of additional file types such as REMXML

The contractor shall also coordinate with software vendors to test the web service functionality.

Deliverable: Home Advisor Web Services Manual Final and posted as requested by technical directive

Due Date: Within 60 days of finalizing web service

Deliverable: User support as needed

Due date: TBD by technical directive

***Subtask 8.6: Create functionality to allow users to export data in HPXML format.***

Deliverable: Home Advisor HPXML export completed

Due Date: TBD by technical directive

***Subtask 8.7: Operate and maintain the Home Advisor.***

Provide ongoing support as needed to maintain the functionality of the tool and the database. In addition, provide reports as requested about the usage in the tool. This may include but is not limited to the number of users in the tool, number of completed actions, and number times specific recommendations have been taken.

Deliverables: TBD as needed

***Subtask 8.8: Community Functionality***

As requested by the COR, allow for additional functionality to allow users to participate in communities that may include but is not limited to:

1. Join communities that are not just utility organizations
2. Allow community organizers to view specific data points of users that have joined
3. Allow messages to be sent from the community to the users inside the profile
4. Allow messages to be sent to users based on attributes of their profile, to-do list and/or completed actions list

Deliverables: TBD as needed

**V. Other requirements**



**A. Guidelines/Standards**

The Contractor shall follow standard life cycle management procedures. Rapid Application Development (RAD) may be used with EPA's consent provided sufficient system documentation is created.

Web Designs must first meet ENERGY STAR design standards as set out in the most recent version of the ENERGY STAR Web Standards & Guidelines. Further, Web designs shall conform to applicable government and EPA Web publishing standards as published in EPA's Web Guide (<http://www.epa.gov/webguide/>). The Contractor will also adhere to EPA graphics/content guidelines (see <http://www.epa.gov/webguide/create/graphics.htm>) and navigation guidelines (see <http://www.epa.gov/webguide/create/navguide.htm>).

To meet some of these standards, it may be helpful for the Contractor to gain access to EPA's Intranet. To do this from a computer that is outside the Agency's network, follow the steps shown at <http://www.epa.gov/webguide/get/getserv3.htm>. The Contractor will make the website accessible to users of all common website browsers and computer hardware/software platforms (e.g. Windows OS, Macintosh, UNIX, etc.).

Designs will also use all available means to maximize the site's usability by disabled people and will, at a minimum, comply with standards issued under section 508 of the Rehabilitation Act Amendments of 1998, and/or under federal regulations promulgated under section 508. See <http://www.webaim.org/standards/508/checklist> for further explanations.

EPA defines all Agency information as sensitive. The Contractor must ensure that all Agency information is safeguarded during the performance of this project in accordance with EPA information security policy and procedures.

**B. Data transferability.**

The data collected in the database portions of the website must be able to be quickly, easily, and reliably transferred by authorized individuals to and from the most commonly used database systems. The Contractor will employ commonly used and available and fully supported web design tools agreed to by the EPA so that EPA can make necessary upgrades, updates, and other modifications to the website after the completion of the contract. Designs should maximize the ease with which future EPA staff can make global changes to coding. Navigational schemes will account for future expansion of a site and use standard hypertext markup language (HTML).

The Contractor may be required to work with individuals developing print materials and other communications tools for this initiative to ensure the website has a common message and look and feel as other materials reaching the same target audience. EPA will indicate to the Contractor which individuals must be coordinated with and for what materials.

**C. Security and Access(s)**

EPA defines all Agency information as sensitive. The Contractor must ensure that all Agency information is safeguarded during the performance of this project in accordance with EPA information security policy and procedures.

**D. Security -- CGI Scripts.**

Any data collected through CGI scripts must adhere to EPA's CGI Script Security Process and Guidance standards. See: <http://www.epa.gov/webguide/index.html>

**E. Form of Deliverables.**

Unless otherwise indicated, all deliverables shall be delivered electronically as attachments to e-mail or loaded directly to Web and database servers dedicated to the ENERGY STAR Web and database. Word processing documents shall be delivered in MS Word unless directed otherwise by the EPA COR. Any hard copy deliverables shall be double-sided unless requested otherwise.

For all enhancements to the legacy iSTAR database and database tools, the contractor must include written specifications that explain their purpose, functionality, and use. All software enhancements should include written user guidelines.

All materials developed under this task order are the property of EPA; the Contractor may not claim copyrights.

***DELIVERABLE DISTRIBUTION LIST:***

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**PROVISIONS & CLAUSES**

The following provisions and clauses are incorporated into the RFW and/or the resulting task order:

- Printing (EPAAR 1552.208-70)
- Organizational Conflicts of Interest Notification (EPAAR 1552.209-70)
- Organizational Conflicts of Interest (EPAAR 1552.209-71)
- Organizational Conflicts of Interest Certification (EPAAR 1552.209-72)
- Notification of Conflicts of Interest Regarding Personnel (EPAAR 1552.209-73)
- Compliance with EPA Policies for Information Resources Management (EPAAR 1552.211-79)

- Payments Fixed Rate Service Contract (EPAAR 1552.232-71)
- Screening Business Information for Claims of Confidentiality (EPAAR 1552.235-70)
- Treatment of Confidential Business Information (EPAAR 1552.235-71)
- Release of Contractor Confidential Business Information (EPAAR 1552.235-79)
- Contract Publication Review Procedures (EPAAR 1552.70)
- Technical Direction (EPAAR 1552.237-71)